Introduction

- Europe—the uncommon market
- Country characteristics influencing downsizing
- Local vendor responses
- European market futures
- Strategies for success

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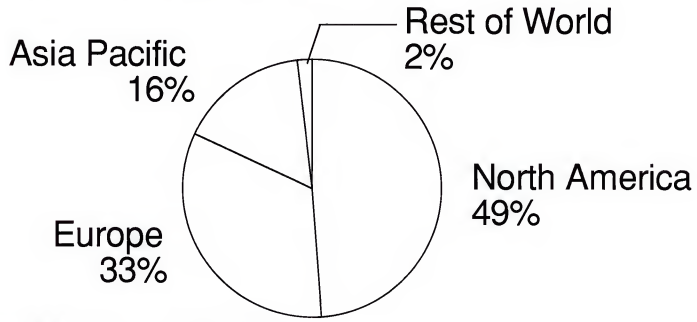
Worldwide Information Services Market—1991



Total Market = $235B

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European Telecommunications Infrastructure

- Country monopolies
  - Resist deregulation
  - Maintain cost barriers
  - Lag technically

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EC/Open Systems

- Brussels bureaucracy or subsidiarity?

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European UNIX Market—1991

Vendor	Unit Shipments Market Share (%)
SCO	26
H-P	18
Sun	18
IBM	12
Digital	10

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European Downsizing Target Architectures

Architecture	Percent	Trend
AS/400	40	Declining
UNIX	35	Increasing
Proprietary	25	Falling

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European Downsizing Plans

	Percent
Already Downsizing	15
Planning to Downsize	35
No Plans	50

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Downsizing Drivers/Inhibitors

- Germany
  - Users demand standardisation but IS managers resist change
- U.K.
  - Economic recession drives 'rightcosting' but users lack investment funds

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Downsizing Drivers/Inhibitors

- France
  - Innovative architectures appeal but large data centres stay
- Italy
  - Government sector demand pull

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Local Vendors

- Basic technology
  - SNI
  - ICL/Fujitsu
  - TELCOs
- Packaging (computer companies)
  - SNI
  - ICL/Fujitsu
  - Bull/IBM
  - Olivetti/Digital

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Local Vendors

- Solutions (standardised)
  - SAP
  - SEMA Group

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Local Vendors

- Operations
  - CGS/Hoskyns/Debis Systemhaus
  - France Telecom - Finsiel
- Solutions (business integration)
  - ICL - Bull
  - SNI - British Telecom
  - Thomson CSF

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Vendor Success in Europe

- Address practical value-added requirements
- Create adaptive structures on country basis

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